

Welcome to **Inform ERP v22**! Our software releases introduce new features and enhancements designed to improve your experience, streamline and automate workflows, and help you deliver operational effectiveness throughout your organization. Take some time to watch our video overview or continue reading on to see what's in store.

## New features

### Schedule Transfer Shipments



Route Stock Transfers alongside your delivery orders on the Truck Manifest! Ship dates can be assigned to transfers directly or by using the drag and drop assignment for easy scheduling. Your driver will see these on their ePod app as well as the printed manifest sheet. Transfers can also be found on the Order Picker Progress screen, allowing for real-time tracking of the daily picking activity.

**Important:** Transfer Spawning is required to utilize transfer deliveries (to track shipment cycles). Set the **Company Master** flag **Spawn New Transfer for B/O items after Shipment Confirmation** to **Yes**.

## Running Balances

Track your invoice and payment history with a combined running balance view of recent activity. Initially all transactions for the current month are displayed. Simply roll the date back to include past history. The new Transactions tab can be found in both the Customer & Vendor Ledgers.

From Date:

Transactions						
<input type="checkbox"/>	Document		Date	PO/Ref #	Amount	Balance
	Beginning Balance		5/1/20		\$39,765.52	\$39,765.52
<input type="checkbox"/>	LA000841		5/8/20		\$1,076.47	\$40,841.99
<input type="checkbox"/>	LA000834		5/8/20		\$115.55	\$40,957.54
<input type="checkbox"/>	LA000906		5/11/20		\$52.25	\$41,009.79
<input type="checkbox"/>	P007010		5/12/20		\$23,225.89	\$64,235.68
	ADJ		5/12/20		-\$23,225.89	\$41,009.79
	POS		5/12/20	Payment	-\$23,225.89	\$17,783.90
<input type="checkbox"/>	LA000955		5/13/20	return	-\$93.51	\$17,690.39
<input type="checkbox"/>	LA000951		5/13/20	HOUSE	\$228.47	\$17,918.86
<input type="checkbox"/>	LA001003		5/15/20		\$259.41	\$18,178.27
<input type="checkbox"/>	LA000988		5/15/20	INDUCERS	\$203.89	\$18,382.16
<input type="checkbox"/>	LA000973		5/15/20	COIL CLEANER	\$147.92	\$18,530.08
<input type="checkbox"/>	LA001098		5/21/20		\$4,550.97	\$23,081.05

## Set Ship To's to Inactive/Hold

Customer:  **DDI Demo Customer**

Ship To's			
<input type="checkbox"/>	Code	Name	Status
	00000001	SAME	Active/Good
	00000002	Demo Shipping Location	Inactive

Look for the new Status option for your customers shipping locations, allowing for Hold or Inactive. Either status will prevent new sales orders from being created. Optionally your search results

can be customized to display this status, or exclude these locations entirely. To modify your search parameters please contact DDI Support. Toolbar icons color coded by functionality, making it easier to quickly identify the option you need. Personalize your toolbar to add and remove the functions that are most important to you. See [Customize your toolbar](#).

## Inline Assembly Components

Assemblies are easier to manage with a redesigned display that places the components directly into the line item details. Customize the grid further with the component specific Field Chooser. In addition to the improved layout comes new enhancements that make assemblies easier than ever.

- **Fast Product:** Create new components items on the fly.
- **Pricing:** Net price and cost can be adjusted for components and optionally rolled up to override the price/cost of the parent assembly.
- **Procurement:** Generate special PO's or transfer requests directly from order entry (or link to an order via Projected PO or Special Purchase Requisition).

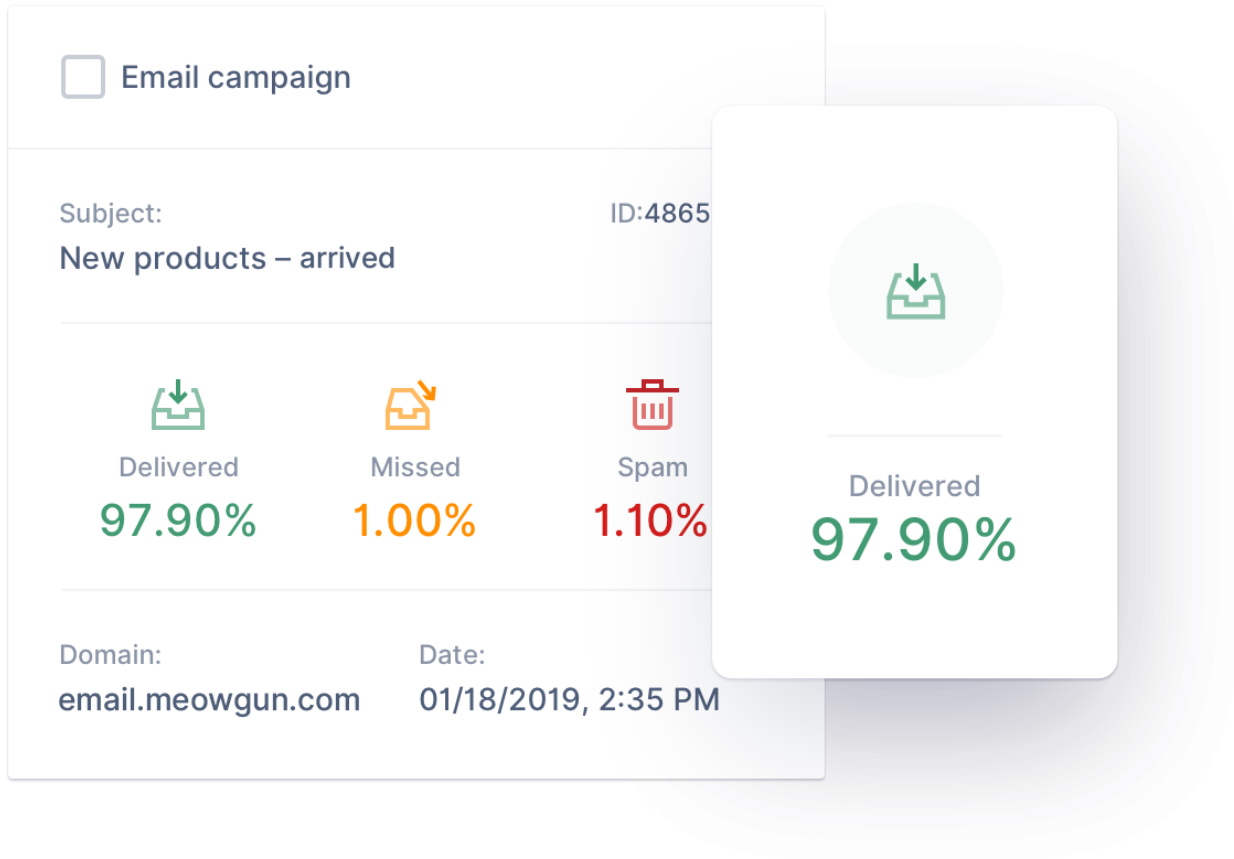
## Multi-Warehouse Procurement

Ship sale order line items from multiple warehouses! Next to the Shipping Whse click the More button, then simply specify the warehouses and quantities. For streamlined fulfillment, consider enabling Company Master setting **Spawn New S/O by Warehouse** which will split the orders up for each warehouse upon creation.

Stock Transfer procurement has also been expanded, making it possible to request or generate transfers from multiple warehouses simultaneously for the same line item.

## Targeted Email Campaigns

CRM subscribers can now integrate with **Mailgun** for detailed analytics and improved deliverability of email campaigns. As a dedicated email platform, Mailgun is better suited to handling mass mailing, complying with CAN-SPAM laws while providing deep insights into open and click rates. This pairs with the Inform Marketing Manager allowing you to craft your message with the HTML editor, complete with product images and links to your eCommerce site.



## Inform WMS

Inform WMS continues its expansion with dozens of new features and enhanced functionality, including priority notifications to alert staff of new orders, paperless picking for stock transfers, and a redesigned home screen for speedier navigation.

[Click here for the complete Inform WMS v22 Release Notes.](#)

# Additional Enhancements

## Accounting

### Accounts Receivable

- Added new Access Levels to limit screen access for *A/R CASH RECEIPTS HISTORY REPORT*, *A/R DAILY CASH RECEIPTS JOURNAL*, and *A/R AGING REPORT*.
- Check payments can be disabled in Cash Receipts, only allowing for Cash or Credit Card, with Customer Master setting Disable Check Payments (located on Credit tab).

- Restrict the Invoice Date field in Sales Order with Access Level *CHANGE INVOICE DATE IN SALES ORDER ENTRY*.
- Tax Exempt Number now displays in the Summary section of the Customer Ledger (Invoices tab).

### **Bank Reconciliation**

Added new Access Level to limit screen access for *BANK RECONCILIATION DEPOSIT TRANSFER*.

## **eCommerce and Mobile tools**

- E-Commerce Pro- Fixed an invalid JSON response in returned error messages.
- E-Commerce Pro- Ship via description was saving incorrectly. This is fixed.
- E-Commerce Pro- Added extended description fields to the OrderPad API response.
- E-Commerce Pro- Customer information again prints correctly on Order Acknowledgement emails.
- E-Commerce Pro- Adjusted control records reviewed when posting the Cayman receipt when an open invoice is paid.

## **Miscellaneous**

### **System Users & Locks**

File Name has been added to the display to help clarify what is being locked (ex: CUSTOMER).

## **Pricing**

### **Price Matrix**

Secondary Price Groups can now be assigned in the Product Master. If the Price Matrix is configured to utilize the Lowest price, then secondary group pricing will be evaluated during order entry.

### **Sales Order**

Rebate cost and vendor contract can be entered during order entry from the Rebate Cost tab on the pricing drop down menu. Enable this with Company Master setting Allow One Time Rebate in S/O.

## Purchasing & Inventory

### Inventory Adjustment

Physical type will now behave similar to a physical inventory by updating Last Physical Date, Time, & Count. Additionally, the Cycle Count checkbox will be cleared.

### Projected Purchase Order

- Future PO is now available in the Field Chooser.
- Projected Stock Transfers can display From Whse data from the Field Chooser.

### Purchase Order Entry

- Custom fields can now be added to purchase orders. Configure from File > Company > Custom Fields.
- Deleting a line item from a Consolidated PO will now remove the item from the linked stock transfer.

### Sporadic Demand

Primary Bin location for the selected warehouse has been added to Field Chooser.

### Stock Transfers

- Deletion of transfers can be prohibited with Access Level DELETE STOCK TRANSFER.
- Notifications that alert salespeople or sales managers about special orders receipts now apply to stock transfers.
- Order Writers will now receive a notification when an item on a transfer (linked to a sales order) is either backordered, spawned, or cancelled.

## Sales & CRM

### Customer Job

Orders/Quotes section now has a Detail tab that displays product information.

### Sales Order Entry

- Builder Allowance - allows a portion of a POS order balance to be billed to an alternative customer account (the builder or contractor). In the Customer Master, General tab, enable the POS Allowance option. Then on the Final section of POS orders is an Allowance tab. Optionally restricting the allowance billing with Access Level BILL ALLOWANCE.

- Check payments can be disabled in POS, only allowing for Cash or Credit Card, with Customer Master setting Disable Check Payments (located on Credit tab).
- Custom fields can now be added to sales orders. Configure from File > Company > Custom Fields.
- Default Ship To is now available in Customer Mass Change.
- Final section includes additional order totals that display previously shipped (invoiced) amounts.
- Line Item Import now has a field to Vendor. This can be imported for new products only, the vendor will not be updated on existing products.
- Swap Committed Quantities - Reallocate inventory from other committed orders. Right click a line item and select the new Swap Committed Quantities. This will present a list of all open orders with that particular product. Enter in the Qty to take, and the older order will be backordered, and the new order will have this inventory committed. Can be restricted with Access Level SWAP COMMITTED QTY IN SALES ORDER ENTRY.
- Whse Rank is now available in the Field Chooser.